

According to a new market research report titled “[\*\*Infection Control Market by Product \[Sterilization \(Steam, Radiation, Sterilants, Indicators\), Disinfection \(Washer, UV Disinfection, Disinfectants\), Endoscope Reprocessing, Protective Barriers\], End User, and Geography—Forecast to 2027\*\*](#)”, published by Meticulous Research®, the infection control market is expected to grow at a CAGR of 13.3% from 2020 to reach \$58.2 billion by 2027.

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Infection control is an essential measure as it prevents or stops the spread of infections in healthcare settings. Infectious diseases are caused by pathogenic microorganisms, such as bacteria, viruses, parasites, or fungi. The diseases can be spread, directly or indirectly, either from one person to another, from infected or non-sterilized surgical or medical devices used to treat a person, or from being in an infected environment in any healthcare facility. Hospital-acquired infections (HAIs), also called nosocomial infections, are acquired in hospitals or other healthcare facilities. The symptoms first appear within 48 hours or more after hospital admission or within 30 days after discharge. HAIs are caused by viral, bacterial, and fungal pathogens. The most common infections are bloodstream infections (BSIs), pneumonia, urinary tract infections (UTIs), and surgical site infections (SSIs). These infections not only threaten the patient's health & life but also prolong hospital stays and thereby create an additional economic burden. These infections constitute approximately 7% and 10% of the total reported infections in developed and developing countries, respectively. Thus, to prevent and reduce the occurrence of infectious diseases, various healthcare facilities are adopting infection control methods and programs to improve the quality of care and provide a safe environment to the patients and other personnel working in the same facilities.

### **The Impact of COVID-19 on the Infection Control Market**

Due to the severity of the COVID-19 pandemic, there has been an unprecedented global demand for advanced healthcare facilities, services, and infrastructure. One of the core parts of healthcare—infection control products, such as PPE are in high demand globally. Healthcare workers rely on PPE to protect themselves and their patients from being infected and infecting others. However, with the increasing cases of COVID-19, healthcare organizations have been increasingly storing face masks and gowns. The WHO estimates that 89 million medical masks were required every month during the initial stages of the pandemic. To meet this demand, a 40% increase in manufacturing was expected. The WHO estimated that frontline workers would need approximately 7–10% of the global supply of surgical masks. The figure went up to 76 million for examination gloves, while the international demand for goggles stood at

1.6 million units per month. By the end of 2020, China made 200 million face masks a day—more than twenty times the number it made at the start of February in the same year. Italy, the worst-hit country in Europe, imported 8,00,000 face masks from South Africa but still needs at least 10 million more. According to the data analyzed by Nielsen Retail Measurement Services, sales of medical masks are up by a staggering 319%. The purchase of household maintenance masks has also increased by 262%, whereas aerosol disinfectant sales grew by 32%.

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Though medical supplies are distributed from the stockpile, there is still a shortage of the same. Thus, to meet the rising global demand, the WHO estimates that the industry must increase manufacturing capacities by 40%. Governments are offering incentives for this industry to ramp up production, including easing restrictions on the export and distribution of PPE and other medical supplies. Moreover, due to the outbreak, there has been a slowdown in trade between countries. This slowdown in trade is disrupting the supply chains of many essential commodities needed to fight the pandemic. The list of such essential commodities includes COVID-19 testing kits, masks, alcohol-based sanitizers, PPE, dress materials for frontline health workers, and ventilators. Thus, governments are taking measures to help accelerate the manufacture of PPE, which ultimately has impacted the infection control market. For instance, the U.K. government delivered over 761 million PPE items, including 158 million masks, 1 million gowns, 135 million aprons, and 360 million pairs of gloves. In March 2020, Airbus (Netherlands) deployed a new air-bridge flight between Europe and China to deliver additional face mask supplies to France, Germany, Spain, and the U.K. Such initiatives are expected to create opportunities for the local market players in each country to ramp up their manufacturing capacities and cater to the rising demand for various types of infection control products and solutions.

### **Key Findings in the Infection Control Market Study**

The infection control market is mainly segmented based on product [sterilization (steam, radiation, sterilants, indicators), disinfection (washer, UV disinfection, disinfectants), endoscope reprocessing, protective barriers], end user [hospitals & clinics, medical device companies, life science industry], and geography. The study also evaluates industry competitors and analyzes their market shares at the global and regional levels.

Based on product, the cleaning & disinfection products segment accounted for the largest share of the infection control market in 2020. The rising cases of healthcare-associated infections (HAIs) due to unhygienic

surroundings are one of the key reasons supporting the largest share of this segment. The prevalence of HAIs has increased the adoption of effective measures among several medical organizations and government agencies to minimize the spread of contagious diseases, due to which the demand for cleaning and disinfection products among hospitals, laboratories, and clinics is on the rise. Moreover, increasing awareness about the importance of clean & disinfected environments, rising standards for effective cleaning, and the recent outbreak of COVID-19 have created growth opportunities for the manufacturers of cleaning and disinfection products.

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Based on end user, the hospitals & clinics segment accounted for the largest market share in 2020. The large share of this segment can be attributed to the growing incidence of HAIs, the increasing number of hospitalizations, the growing number of hospitals in developing countries, increasing collaborations between private & public hospitals for providing quality care, and the rising number of surgical procedures. Further, the COVID-19 outbreak has increased the usage of infection control products, such as PPE and disinfection & sterilization solutions, among hospitals & clinics.

The report also includes an extensive assessment of the product portfolios, geographic analysis, and key strategic developments of the leading market participants over the past four years (2017–2020). The infection control market has witnessed a number of new product launches, collaborations, partnerships, agreements, and approvals in recent years. For instance, in April 2020, 3M Company (U.S.) collaborated with Steris plc, Advanced Sterilization Products (ASP) STERRAD Sterilization System, and Battelle to evaluate whether the proposed decontamination systems could be used in conjunction with limited respirators during critical shortages due to COVID-19. Also, in April 2020, STERIS plc. (U.S.) received USFDA's Emergency Use Authorization (EUA) for the respirator decontamination of N95 respirators amidst the coronavirus pandemic.

The key players operating in the global infection control market are STERIS plc. (U.S.), Cantel Medical Corp. (U.S.), Getinge AB (Sweden), Ecolab (U.S.), 3M Company (U.S.), Advanced Sterilization Products (U.S.), MMM Group (Germany), MATACHANA Group (Spain), Belimed (Switzerland), and MELAG Medizintechnik GmbH & Co. KG (Germany) among others.

### **Scope of the Report:**

#### **Infection Control Market, by Product**

- Cleaning and Disinfection Products

- Consumables & Accessories
  - Disinfectants
    - Disinfectants Market, by Type
      - Instrument Disinfectants
      - Hand Disinfectants
      - Surface Disinfectants
      - Skin Disinfectants
  - Disinfectants Market, by Formulation
    - Liquid Disinfectants
    - Disinfectant Wipes
    - Disinfectant Sprays
  - Lubricants & Cleaning Solutions
  - Others
- Equipment
  - Washer Disinfectors
  - UV Disinfection Systems
  - Ultrasonic Cleaning Equipment
  - Others
- Sterilization Products
  - Sterilizers
    - Steam Sterilizers
    - Low-temperature Sterilizers
    - Radiation Sterilizers
    - Others
  - Consumables & Accessories
    - Sterilization Indicators
      - Biological Indicators
      - Chemical Indicators
    - Sterilants
    - Instrument Packaging & Pouches
    - Others

- Endoscope Reprocessing Products
  - Consumables & Accessories
  - Endoscope Reprocessing Equipment
    - Endoscope Drying, Transport, and Storage Systems
    - Automated Endoscope Reprocessors
    - Endoscope Tracking Systems
- Protective Barriers
  - Gowns & Drapes
  - Face Masks
  - Personal Protective Equipment Kits
  - Covers & Closures
  - Goggles
- Software

### **Infection Control Market, by End User**

- Hospitals & Clinics
- Life Science Industry
- Medical Device Companies

### **Infection Control Market, by Geography**

- North America
  - U.S.
  - Canada
- Europe
  - Germany
  - France
  - U.K.
  - Italy
  - Spain
  - Rest of Europe (RoE)
- Asia-Pacific (APAC)
  - Japan

- China
  - India
  - Rest of APAC (RoAPAC)
- Latin America
- Middle East & Africa